



Telephony Web Services

TWS Caller v3.1

User Guide




© 2008 Algoria.
TWS™ (Telephony Web Services)
and associated products, is a
registered trademark

Contacts and Support

ALGORIA

Address: 3, rue Verte
95100 Argenteuil
France
Tel: +33 1 34 34 40 34
Fax: +33 1 34 34 40 39
E-mail: support@algoria.fr
URL: <http://www.algoria.fr>

Online documentation

You can access online documentation by clicking on the  icon on the **TWS Caller** sidebar, then by choosing the *Documentation* option.

Document control

Current version 1.4
Previous version 1.3

TWS Caller v3.1 User Guide
TWS Caller v3.1 User Guide

16 Jun 2009
05 Jun 2008

Table of Contents

1• Overview of TWS Caller	1
1.1. Running the application	
1.2. Available telephony functions	
1.3. Overview of the TWS Caller Sidebar	
2• Outbound calls	5
2.1. Dialling with Drag/Drop	
2.2. Dialling with Copy/Paste	
2.3. Dialling a number in the Quicksearch box	
2.4. Dialling from a contact list	
2.5. Dialling from the call log	
2.6. Dialling from a search result	
2.7. Dialling from a contact Infocard	
2.8. Redirected Outbound calls	
3• Inbound calls	9
3.1. Answering an Inbound call	
3.2. Redirecting an Inbound call	
3.3. Redirected Inbound call	
4• Using the calls management zone	11
4.1. Active calls	
4.2. Initiating a consultation call	
4.3. Managing active calls	
5• Contacts management	15
5.1. TWS Presence	
5.1.1. The 6 TWS presence status	
5.1.2. The notion of current device	
5.2. Calendar (Ms Exchange or Lotus Notes) presence	
5.3. Telephony status	
5.4. Phone Icons	
5.5. Creating a contacts list	
5.6. Managing your contact lists	
5.7. Adding an existing contact	
5.8. Adding a non existing contact	

6• «InfoCard»	22
7• Call log	27
8• Managing Forwarding rules	29
8.1. Simple rule activation	
8.2. Activation principles and priorities	
8.3. My current device	
8.4. Voice Mail rule	
9• Advanced Search	36
10• Preferences	37

1. Overview of TWS Caller

TWS Caller is a Web service-based CTI (Computer Telephony Integration) and unified communication application, delivering high-end, easy-to-use, telephony features to the end user.

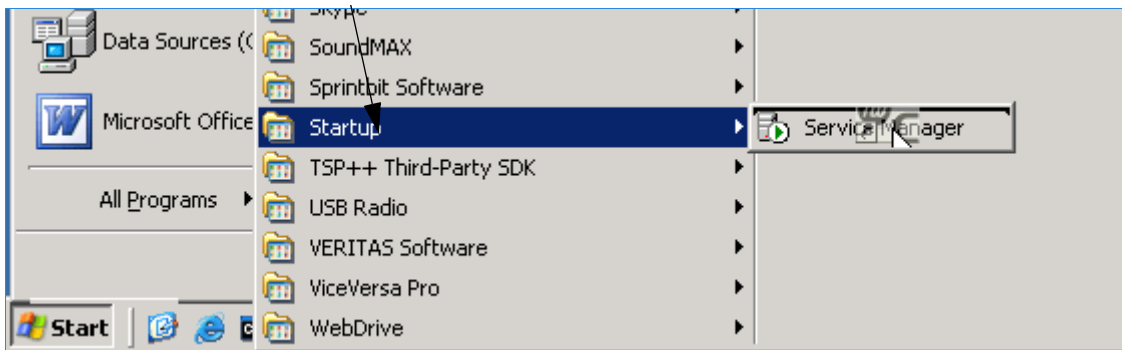
TWS Caller provides a unique set of services:

- on the fly universal dialer,
- efficient phone assistant,
- comprehensive multi-directory connector,
- presence management and communication productivity features,
- web-based mouse-click multiline phone monitoring,
- mobility features.

1.1. Running the application

Within a Windows environment:

If the application does not start automatically, launch it from the *TWS_Caller.exe* shortcut. You can open **TWS Caller** automatically each time the computer starts up by placing it in the *Start* folder in the *Startup* menu (see configuration documentation for more details):



In Full Web mode:

Enter the following URL in your browser:

http://servername/tws2/TWS_Caller/web/TWS_WebStarter.html

1.2. Available telephony functions

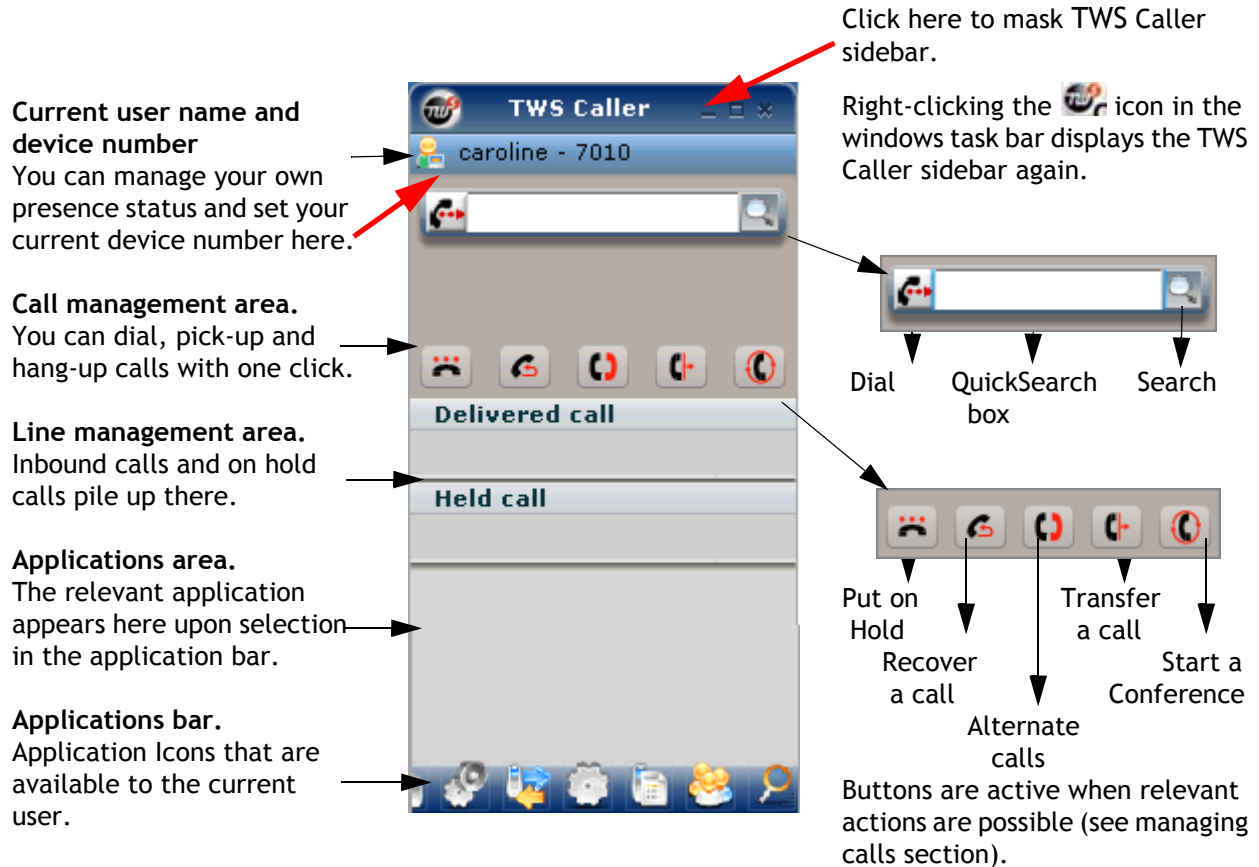
TWS Caller offers the following telephony functions:

- Multiple possibilities for outbound number dialling, including speed dial, copy/paste to call, drag/drop to call, multi-directory search and call, quick call from contact lists or call logs.

- Advanced call management features: transfer, put on hold, divert and conference.
- Presence management features: TWS presence, workstation activity check (user permitting), calendar presence (Exchange/Outlook or Notes), line monitoring with telephony status (free, ringing, busy).
- Simple inbound call forwarding depending on TWS presence status and/or Exchange or Notes calendar status.
- Call log management (outbound calls, inbound calls, missed calls).
- Profile management (messaging system password, alias management, TWS application management) and preferences.
- Mobility feature with current device setting, to receive your calls on another extension / mobile phone.
- Ease of integration within the desktop and online TWS documentation.
- Comprehensive contact management, including:
 - multiple contact lists management: displayed and managed contacts can be TWS users, TWS directory contacts, or contacts belonging to connected directories or databases (PBX directory, LDAP, Exchange/Outlook or Notes contact folders, databases with ODBC or SQL access)
 - contact presence information display (TWS presence, calendar presence, telephony status)
 - one-click contact communication features: click to call, to chat, to send an SMS/ e-mail, to create a note
 - contact-based action and event log: summary of the communication history with a specified contact.

1.3. Overview of the TWS Caller Sidebar

By default, the **TWS Caller** sidebar is located on the top left side of your screen and displayed as below:



Current user name and device number
You can manage your own presence status and set your current device number here.


Call management area.
You can dial, pick-up and hang-up calls with one click.

Line management area.
Inbound calls and on hold calls pile up there.

Applications area.
The relevant application appears here upon selection in the application bar.

Applications bar.
Application Icons that are available to the current user.

Click here to mask TWS Caller sidebar.

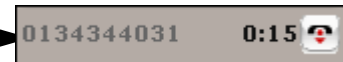
Right-clicking the  icon in the windows task bar displays the TWS Caller sidebar again.

Dial QuickSearch Search box

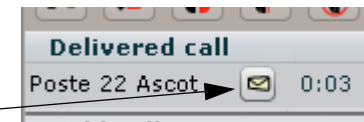
Put on Hold Recover a call Alternate calls Transfer a call Start a Conference

Buttons are active when relevant actions are possible (see managing calls section).

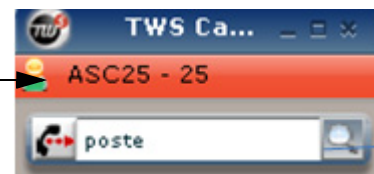
When a call is active, the number and/or name of the contact appears in the «**Active Call**» zone with the time length of the call and the Hang-up icon.



Upon inbound call, the number and/or name of the contact appears in the «**Incoming Calls**» zone with the call waiting time to the right and the possibility to transfer to your voice mail box.








Missed Calls: You have a missed call when the TWS login bar is orange. Click on it to open the call log window, which will then be refreshed and will display missed calls (See call log section for more information).



Note: You can resize the window by dragging its border using the bottom right corner.

Specific applications are launched from the Application bar. Per default, the **TWS Caller** includes the following applications described in this document:

-  Forwarding Rules (simple rules)
-  Preferences
-  Call log
-  Contact lists
-  Advanced Search

Note: Other applications can be available in the Application bar if you have acquired other relevant TWS modules (TWS Mail, SoftPhone, AudioShare, VideoShare, Stats, Rules and Recorder).

Upon selection in the application bar, the relevant window opens with the corresponding icon displayed in the window title bar.

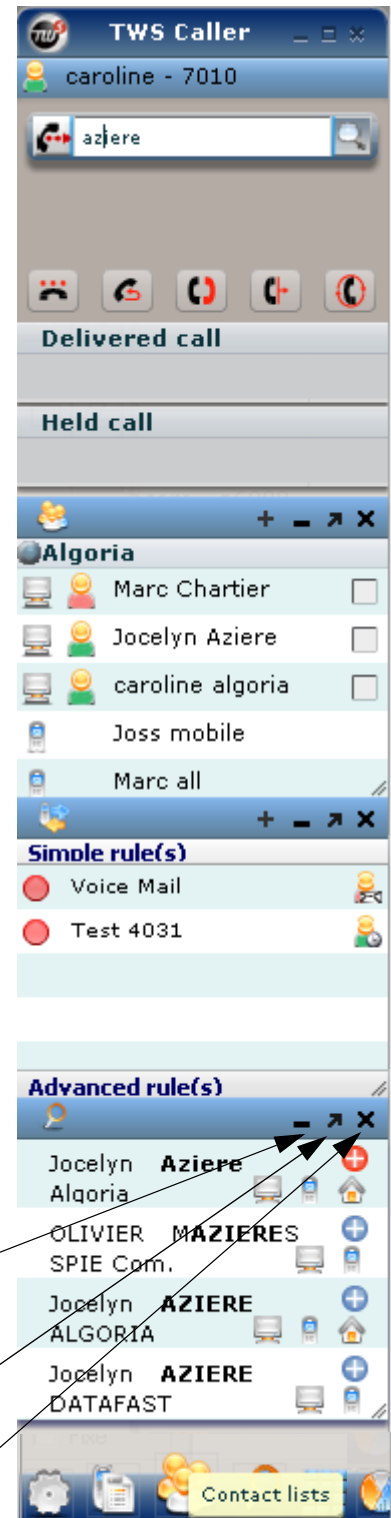
These windows can also be opened outside the vertical Caller sidebar, resized to show only the window title bar, or closed.

In the **TWS Caller** sidebar shown aside, there are 3 opened integrated windows (Contacts, Forwarding rules and Search results).

Resize to title bar only (click on the same icon to expand the window again)

Open Window outside TWS sidebar

Close Window



Note: A mouse over the actions icons in the «Active call» zone or in the «Application bar» will show their description (tooltip).

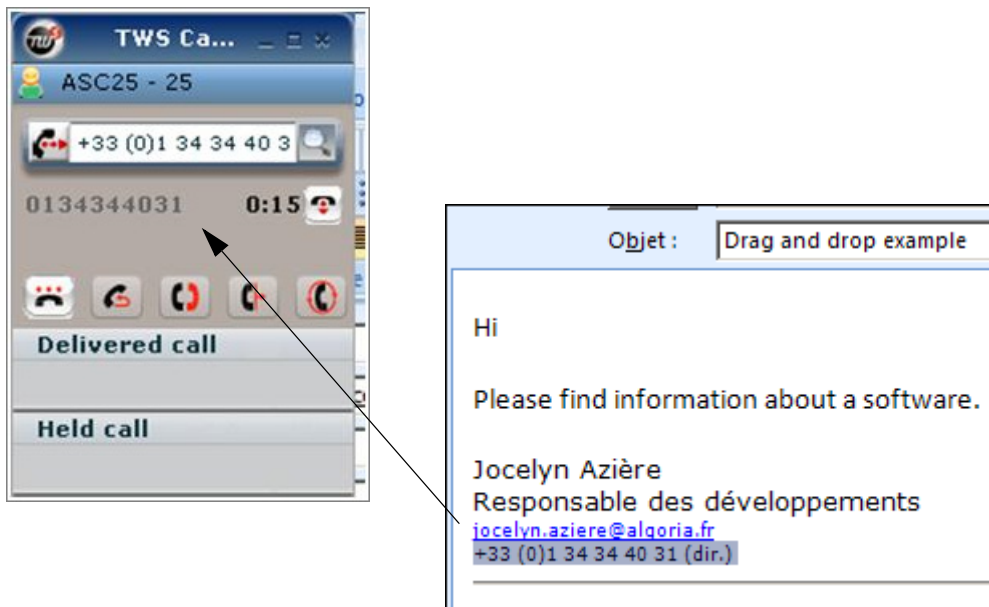
2. Outbound calls

2.1. Dialling with Drag/Drop

Step 1: select the number you wish to dial by highlighting it in any application (Internet explorer, Excel, Outlook, etc.).

Step 2: drag the number (entire string) with the left mouse button and drop it on any part of the **TWS Caller** sidebar.

Step 3: release the left mouse button. The number appears in the **TWS Caller** Quicksearch box. The string is «cleaned» to ensure the right number is dialled and the call is made.



2.2. Dialling with Copy/Paste


In environment which does not support «drag/drop» feature, you can still perform speed dialling if the «copy/paste» feature is supported:

Step 1: select the number you wish to dial by highlighting it.

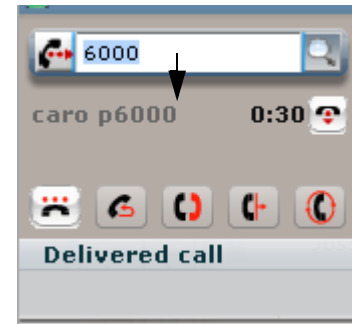
Step 2: right-click and select the copy option (or use the [Ctrl+C] on Windows, [Apple+C] on Mac) to copy the selected string into the clipboard.

Step 3: click on the  icon in the **TWS Caller** sidebar in order to make the call.

2.3. Dialling a number in the Quicksearch box

You can key in a phone number in the QuickSearch box, then click on  in the **TWS Caller** sidebar to activate the call.

The relevant contact name is displayed if found in one of the connected directories or databases.

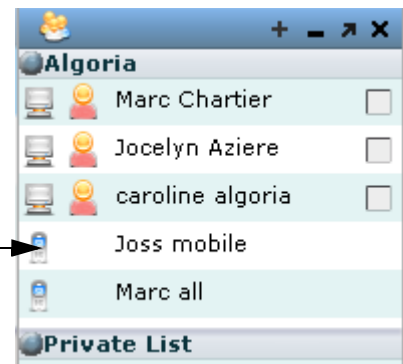


2.4. Dialling from a contact list

In your personal contact list, click on the name of a contact to call its default phone number.

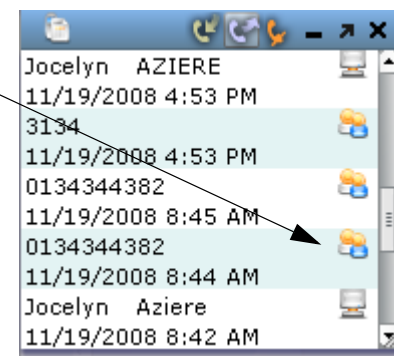
You can change the contact default number to call by clicking on the phone icon (office, home, mobile,...). If other numbers are available for this contact, the list of numbers (represented by the different icons) will be displayed.

Note: The meaning of the Phone icons and presence status are described in the Contact management section below.




2.5. Dialling from the call log

In the call log (See call log section), click on the phone icon of the number or contact you want to call.



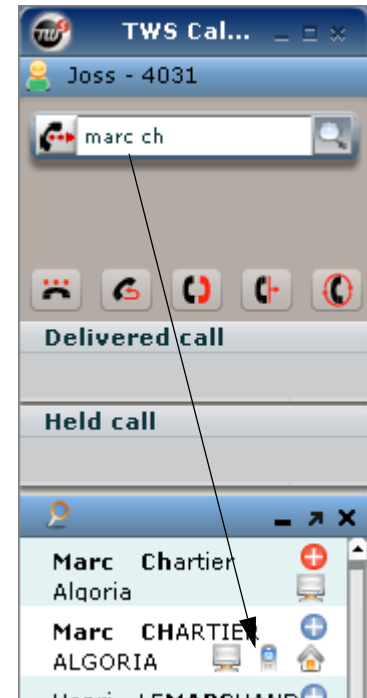
2.6. Dialling from a search result

Enter a search string (name or number) in the Quicksearch box, then *validate via Enter* or by clicking on .

The search is a multi-directory search: it will search within all the directories and databases which are connected to TWS and within your own TWS directory (called «TWS personal contacts», created manually), in which TWS stores the contacts that you have created manually (see section adding a non existing contact below for further explanation about the «TWS personal contacts»).

Upon search:

- All matching contacts will appear in a search window integrated in the **TWS Caller** sidebar. You can then click on the relevant phone icon to activate the call. A contact can have up to 5 different phone numbers (represented by different phone icons described in the call management section below).
- If you get no result, it means that TWS did not find any matching contact in any of the connected directories or databases.
- If you get more than 30 results (parameter to be configured by your administrator), you will get the message «too many results», you then need to enter a more restrictive search criteria or use the TWS «Advanced Search» (See Advance Search section below).



Note: When the search window is opened, you can realize that this process is a fully *dynamic search*.*

You can enter several strings separated with spaces in the quicksearch box. The search will then look for contacts, whose last name, first name and company name include one of the several strings (See the example above).

You also can enter a number as a string to be searched for. The search will then look for all the contacts whose phone numbers include the given number.

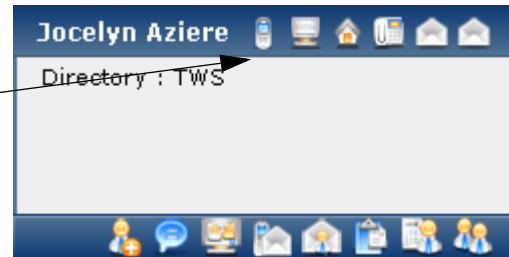
The following directories can be configured in **TWS Caller**:

- TWS personal directory,
- SQL database directory,
- ODBC database directory (Access, etc.),
- Exchange 2003/2007 or Exchange 5.5 contacts directory (private and/or public),
- PBX contacts directory (internal and/or external records),
- Notes.

Please contact your TWS administrator to configure the directories you need in **TWS Caller**.

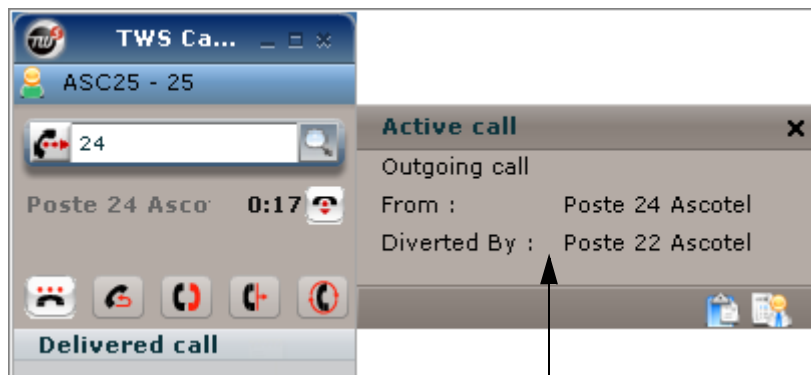
2.7. Dialling from a contact Infocard

When the Infocard of a contact is displayed (See Infocard section), click on the phone icon symbolizing the number you want to dial (e.g. mobile, office, home,...).



2.8. Redirected Outbound calls

You can view the result of Outbound calls redirected to another contact in the call Infocard displayed automatically when your outbound call is redirected to another contact or number.



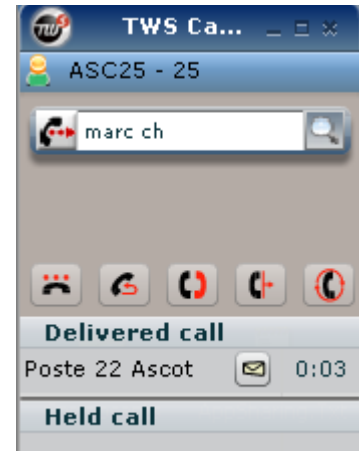
Outgoing call to device 22, redirected to device 24

3. Inbound calls

3.1. Answering an Incoming call


The second zone located just under the action buttons shows the Incoming calls. When a person tries to reach you, its phone number is displayed in the «Incoming calls» frame, as well as its name (if filled in the company directory, depending on the TWS server configuration at your site), and the call-waiting time.

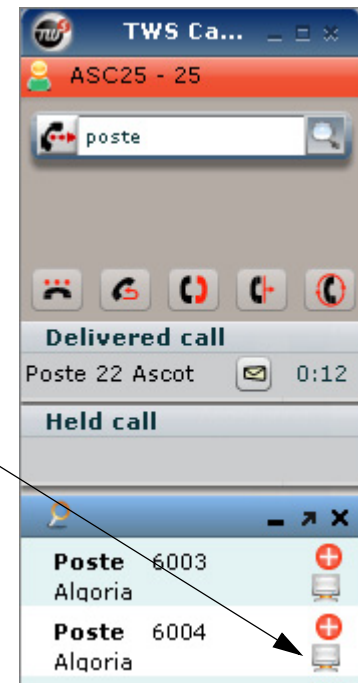
By clicking on the phone number and/or name of the person, you answer the call, which will then move to the «active call» zone (See section below).



3.2. Redirecting an Incoming call

There are four ways to redirect an Inbound call.

-  allows you to redirect the call to your voice mail with one click.
- You can redirect the call to one of your contacts using *Drag/Drop*. Open your contact list, (left) click (without releasing) the Inbound call and place it on the relevant contact to whom you want to redirect the call, then release the mouse button.
- You can also redirect the call to a contact in the QuickSearch results. Once the search results is displayed, *Drag/Drop* the call to the phone icon where you want to redirect the call.
- You can enter a destination number in the Quicksearch box and *Drag/Drop* the call to the Quicksearch box.



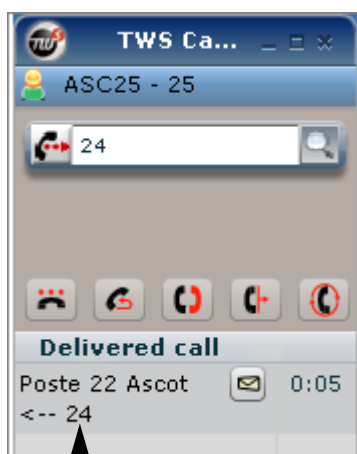


If you take the call while you are already in communication with someone else (a communication is already displayed in your «active call» zone), the current call is automatically placed on hold, in the «Calls on Hold» frame.

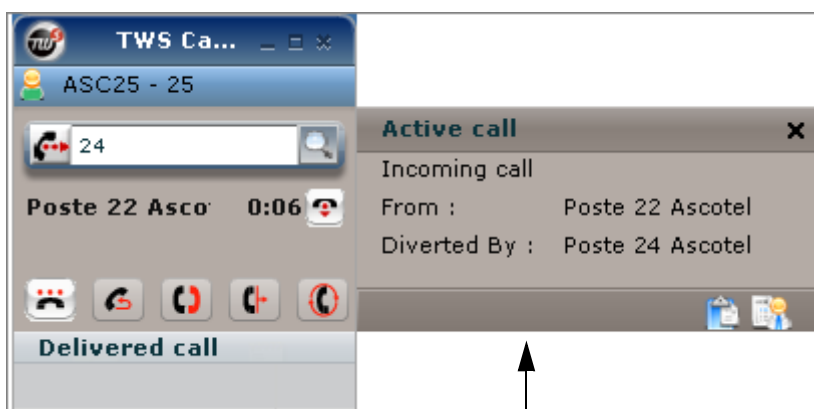
You cannot organize a conference with a third person using an Inbound call. If you already have a conversation going on with the first speaker, you need to be the one to make the call to the new speaker (See conference in the call management section).

3.3. Redirected Incoming call

You can view the result of Inbound calls redirected from another contact, before and after the call is answered.



Redirected call information



Caller information

Information on the current call

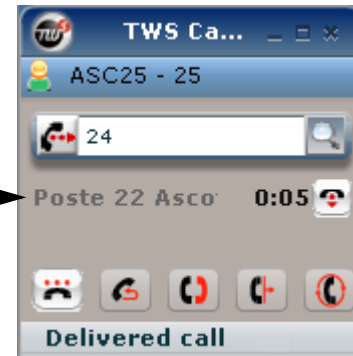
4. Using the calls management zone

4.1. Active calls

The area located under the QuickSearch box shows the active calls.

This frame is active when you make a call, pick-up a new call or recover a call placed on hold. The action buttons are also enabled when at least one call is active. There cannot be more than two active calls at the same time.

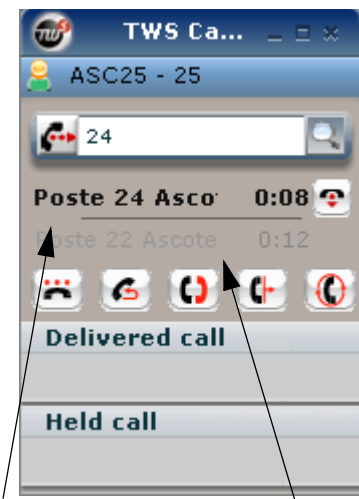
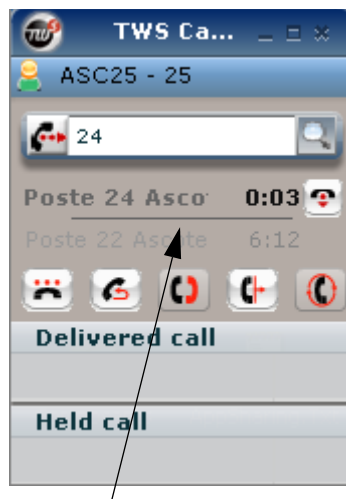
Note: When you make a call the time length is calculated from when it started to ring, and the name or phone number is highlighted in bold as soon as your contact picks up the Phone.



4.2. Initiating a consultation call

In order to make a second call you need to click on the call button after dialling a number in the QuickSearch bar, or click directly on a phone number in the contact list, Infocard, call log, or search results in the TWS directories.

Making a second call automatically puts the first call «temporarily on hold», whilst staying in the «active calls» zone.




Second call Active and ringing Second call active and online First call temporarily on hold

Once the call is established with the new contact, the two calls appear in the «active calls» frame and the buttons «recover», «alternate», «transfer» and «set a conference» become active (see section below).

4.3. Managing active calls

Six actions are available through the following buttons:

-  To hang-up


If you have two calls in «active» mode but one being «temporarily on hold» (in case of dual calls), using this function will have a different effect depending on your device mode being VTI-XML or CSTA (See your administrator).



Aastra 5000 CSTA or IntelliGate: The current communication is terminated, the call placed «temporarily on hold» becomes immediately active (e.g. same result as «recover», see below).

Aastra 5000 VTI-XML: you hang-up but the two interlocutors are put in relation (e.g. same result as «transfer», see below).

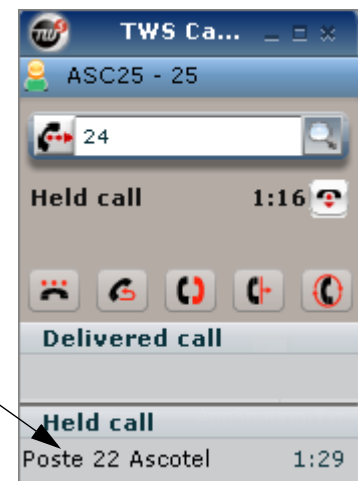
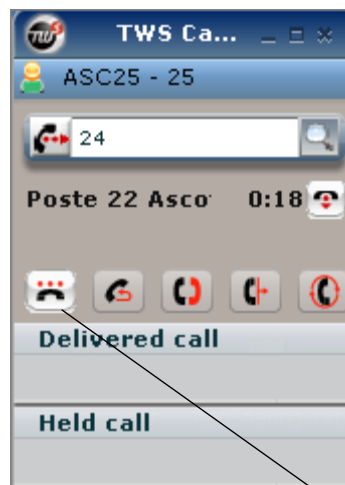
If you are in conference mode with two people (See below), the current conversation is terminated, but the two interlocutors stay online together.

-  To put on hold

By clicking on this icon, the active call will disappear from the «active call» zone and move to the «Calls on Hold» zone.

When a contact is on hold, his phone number and/or name appears in this frame.

To retrieve a call on hold, click on the name or number displayed in the «On Hold Call» zone, the call becomes active again and moves to the «active calls» zone.



If you have two calls in the «active call» zone, the on line interlocutor moves to the «Call on Hold» frame. The one placed «temporarily on hold» is put on line.

You cannot set a conference with a call on hold (In the «Call on Hold» zone).



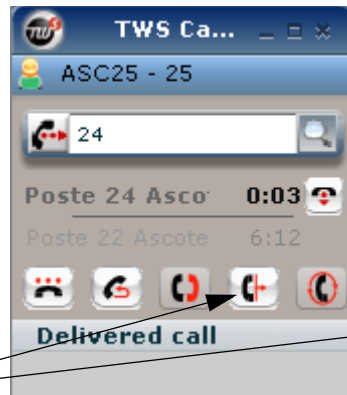
You cannot hang-up a communication placed on hold. You need to recover the call to put it in the «active call» zone first.

You can put a conference on hold. However, only one number will appear in the frame. You will be able to recover the conference at any time, the other interlocutors being able to discuss in private whilst you have put them on hold.

• To transfer a call

You need to first initiate a consultation call. The manipulation is performed in two steps:

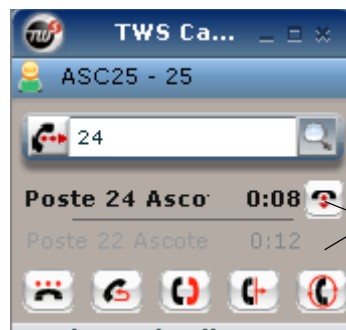
1. When on line with a contact, dial a number or click on another contact to call.
2. When the consultation call is made, click on the transfer button.



Note: The button appears only when there are two active calls. You can transfer the call when the consultation call is still ringing.


• To alternate two calls

Available only when there are two active calls, a click on this button allows to swap the state of the calls. The first call becomes «temporarily on hold» (but still staying in the active calls zone) whilst the other is put on line.



-  To recover an active call

Available only when there are two active calls, when you have established a dual call and want to close one of the two conversations. A click on this button closes the active conversation, and recovers the conversation previously placed in «temporarily on hold». If you want to close the other conversation, you have to «Alternate the calls» before.

-  To set a conference

Available only when there are two active calls, this function allows the two contacts to become active in conference mode.

The result shows one call in the active zone with the details of the conference participants.

Three actions described above are available while in conference mode:



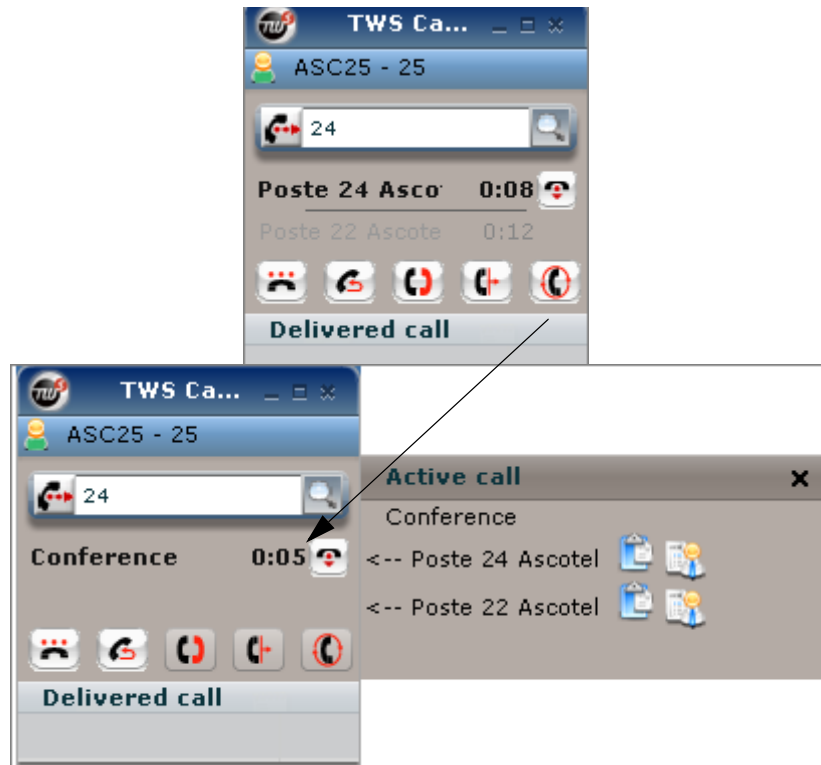
: Hang-up



: Put on hold



: Call recovery



Special case: If you use «call recovery», you will end the conversation with the person who was the last to be on line with you prior to the conference.

5. Contacts management

The contacts window is a key component of **TWS Caller**. It allows you to create new personal contacts and lists, to see the presence status of your contacts (TWS users), and it also enables speed dialling to call your contacts.

You can display the contact lists window by clicking on the icon  in the application bar.







Each contact can have three types of presence described below.

- TWS presence,
- Calendar presence,
- Telephony status.

5.1. TWS Presence

A TWS user can manage its TWS presence with one click, and therefore inform other users about its availability.

5.1.1. The 6 TWS presence status

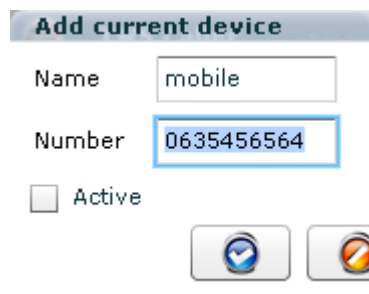
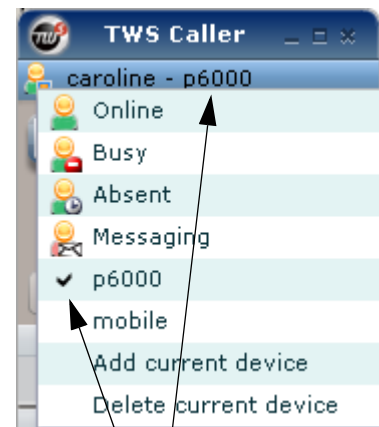
-  **Offline**: when **TWS Caller** is closed, the presence status is moved to offline by default.
-  **Online**: when **TWS Caller** is activated for the first time, the presence status is set to online by default. For the following activations, the presence status will go back to the last used status.
-  **Busy**: to inform colleagues that you don't want to be disturbed.
-  **Not available / Absent**: you can set **TWS Caller** to move automatically to this status after a fixed time with no computer activity defined in the user preference.
-  **Voice messaging**: all calls are automatically forwarded to your voice mailbox. Go to your user preferences to set the forwarding condition to Immediate, busy or No answer.
-  **My current device**: you can activate this status by clicking on the name of the device added as current device.

Your own presence status is also displayed in the title of the main Caller window. You can change it by clicking on it. You will be able to choose between online (by default), busy, Not available/Absent, Voice messaging or My current device (Offline being automatically selected when you close the application).



5.1.2. The notion of current device

The notion of current device allows you to use **TWS Caller** from any device. You can create multiple «current device» statuses if you need to, by clicking on «Add current device», and adding name and number.

They will appear in the list of TWS presence statuses.

The «current device» will be marked and will appear in the title bar upon selection.

When you want to delete a «current device», you are asked to confirm which «current device» you want to delete.

The notion of current device can be completed by setting a simple forwarding rule to receive your calls on your current device. This rule can be coupled with your presence status to take effect (See forwarding rules section).



Note: When you set your TWS presence to another device and call somebody, the calling number displayed to them is your normal extension number.

5.2. Calendar (Ms Exchange or Lotus Notes) presence

TWS Caller allows you to view TWS users contact calendar status automatically updated from their Ms Exchange or Lotus Notes calendar. These statuses, based on calendar events, are represented in TWS as:

You will also be able to see the details of the calendar event in the user's InfoCard (See infocard section below).

Note: To view calendar presence, TWS must be connected to your messaging directory. Please see your administrator.

- ☐ No Calendar status
- ☒ Available or Free
- ☒ Busy

and, for Ms Exchange only

- ☒ Not available or Out of Office
- ☒ Tentative

5.3. Telephony status

TWS Caller allows you to view the contact phone status displayed through different background colors, only in the following cases:

- the contact is a TWS user
- You are allowed to monitor this contact (Please contact your administrator to set supervision rules).

The three Telephony presence statuses are:

- Free or available, no background color:

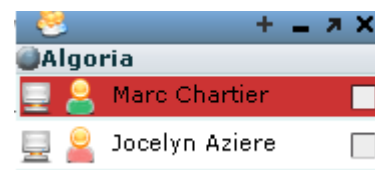
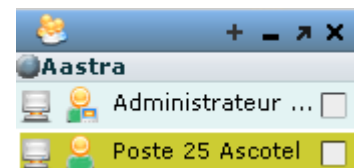
If you click on contact's name, you call its default phone number, and that contact will automatically change to yellow.

- Ringing, yellow background:

Your contact phone is ringing. you can intercept the call by clicking on the contact name. If the contact picks up the call, the background changes to red.






- Busy, red background:

The contact is on the phone and his line is engaged.



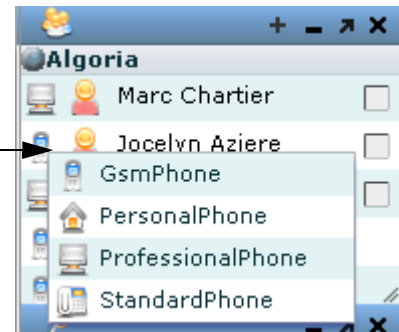
5.4. Phone Icons

Each contact can have a set of telephone numbers identified by different icons. These Phone icons are:

-  Office
-  Home
-  Mobile
-  Switchboard
-  Assistant

Each contact also has a default phone number assigned in the contact list, represented by the relevant icon, and used for direct dialling when you click on the contact name.

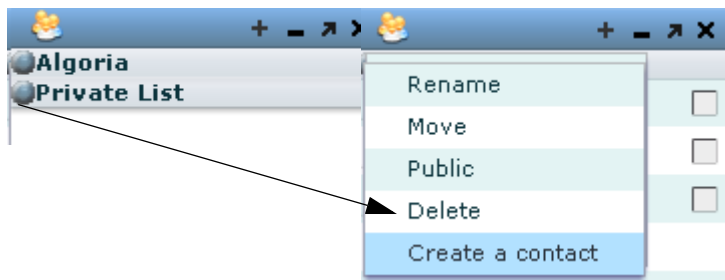
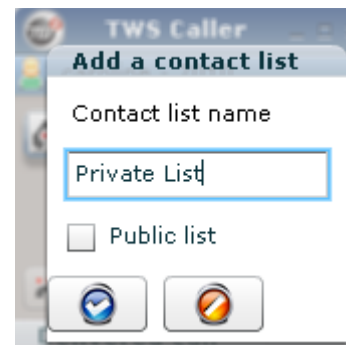
However, this default number can be changed by clicking on the phone icon, and selecting a new icon in the list (if other phone numbers are filled in for this contact).




5.5. Creating a contacts list

Open the contacts window, and click on +. In the window, type the name of the list, select Public list if you want to share the list with other TWS users, and save. Your list has been added to the contacts window.

You can then rename, suppress the contact list, or make it public or private, using the buttons in front of your contact list.




5.6. Managing your contact lists



You can display the contact lists management window by clicking on the icon  in the application bar.

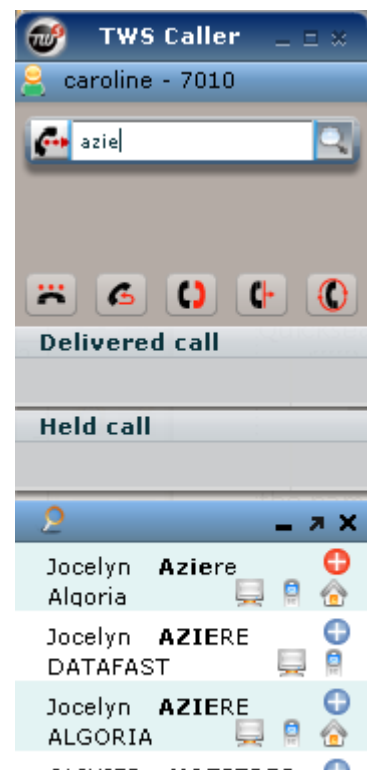
You will be able to select Public contact lists created by other TWS users, and move contact lists.

5.7. Adding an existing contact

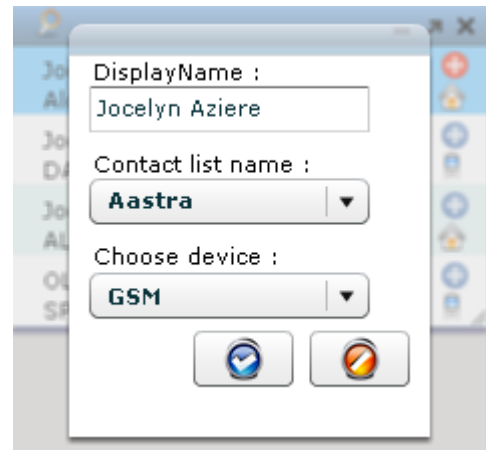
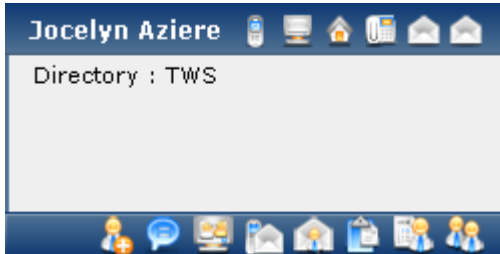
Adding existing contacts is easy with the TWS multi-directory search. It will search within all the directories and databases which are connected to TWS and within your own TWS directory (called «TWS personal contacts»), in which TWS stores the contacts that you have created manually (See section adding a non existing contact below for further explanation about the «TWS personal contacts»).

In the search results window, contacts are sorted by highest matching to the search criteria. The same contact can appear several times if they appear in multiple directories. If one of these directories is the TWS users directory, choose it, as it allows you more contact actions like video conference and chat (if listed in the search results, it should appear first with the red icon ).

- : by clicking on this button, a contact is added to your contacts list, but you will only be able to perform the following actions: speed dialling, create a note, send an SMS and send an email (if the relevant application is included).
- : by clicking on this button, a TWS user is added to your contacts list and you will be able to perform additional actions: view his TWSpresence status, messaging calendar (Ms Exchange or Lotus Notes) presence and telephony status, as well as initiate a chat, audio conference or video conference with the contact (if the relevant application is available to you and to those users).



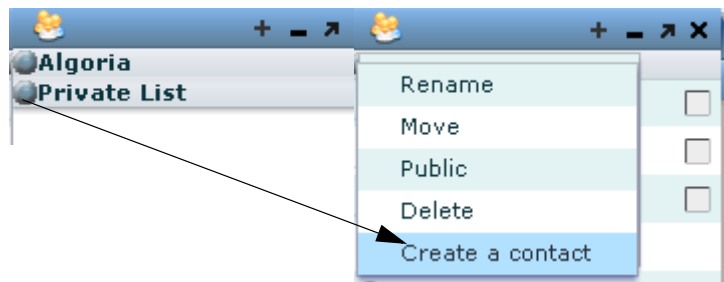
- When you add an existing contact, you are required to specify the contact list name and the default number for direct calls.
- An Infocard is also displayed when you move the mouse over the contact, showing the source directory (See Infocard section for more details).



5.8. Adding a non existing contact

Click on the button displayed in front of the name of your contacts list, and then click on *Create a contact*.

The contacts which are manually added to one of your contact lists are placed in a directory called «TWS personal contacts».



In the new contact window, fill in the relevant information, at least the default phone number, contact name and contact list (existing or new contact list). The phone icons which will appear in the contact Infocard and available for direct calls will depend on the phone numbers filled in this window.

General information

Display name

Last name

First name

Company

Office phone

Mobile phone

Other information

Assistant phone

Switchboard phone

Email 1

Email 2

Home phone

Personal web site

Default phone type

☐ Switchboard ☐ Assistant ☐ Office ☐ Mobile

☐ Home

Contact list name : (*)

Algoria ▼

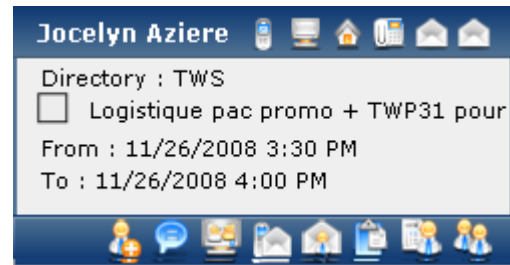
Cancel

Send

6. «InfoCard»

The Infocard is a window appearing each time the mouse goes over a contact, either in a contacts list, in call logs, or in the calls management zone (during a call, for example).

You can, in the latter, view detailed contact information (if available in TWS connected directories or databases) during the call or retrieve them in the actions log after the call.





The InfoCard contains information about the source directory of contact and, for TWS users, messaging calendar (Ms Exchange or Lotus Notes) presence (see calendar presence section above), and details on the event (event title, start and end time of the event).

Note: To view calendar presence, TWS must be connected to your messaging directory. Please see your administrator.

Depending on the contact, the Infocard allows different actions described below:

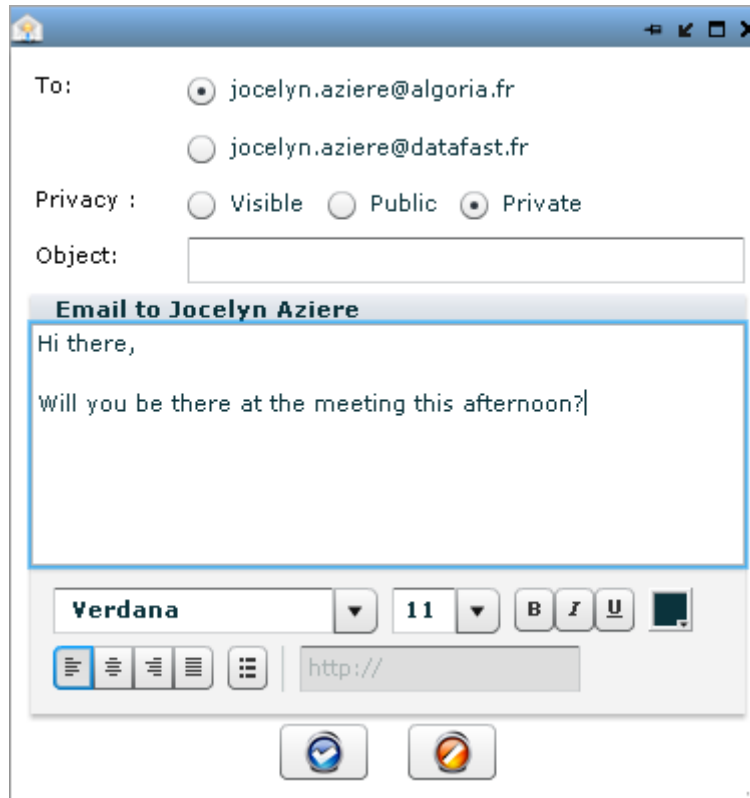
- **Dialling:** by clicking on one of the icons symbolizing the different contact phone numbers (See phone icons in the contact management section).

-  **Send an e-mail** (If the user has an e-mail address). This will automatically launch your messaging client (Ms Outlook or Lotus Notes) and open a blank email with your contact's email address already entered as destination.
Note: if 2 e-mail icons appear, the user has several e-mail addresses.






-  **Send a TWS mail:** A new window appears which allows you to send a mail to your contact. If the contact has multiple e-mail addresses (e.g. private and business), you can then select the relevant e-mail address.


TWS mails are recorded in the contact actions log and can be made *visible* to every one (other users can only view the subject of the e-mail sent to the contact), *public* (the content will also be visible to all users) or *private* (by default - you will be the only one to view the mail in the actions log).

After having entered the subject and text of the message, the TWS mail is sent to the contact's messaging system as soon as you confirm.

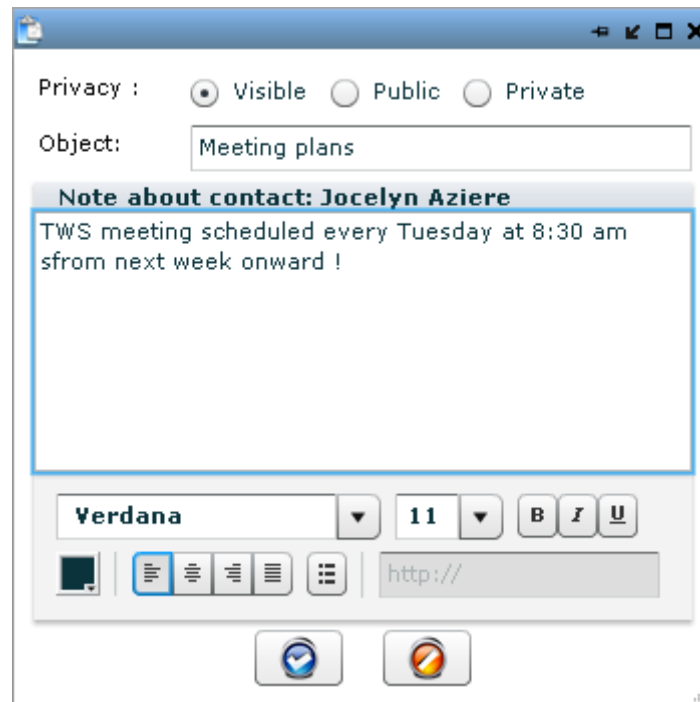


Note: For each opened window, you can:

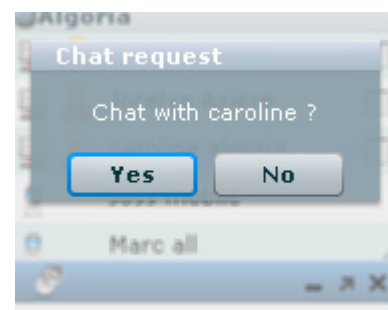
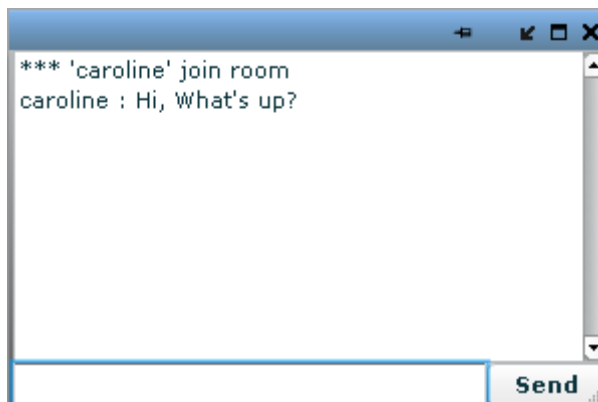
- Resize the window by dragging its edge (the bottom right corner),
- Close the window by clicking on  or ,
- Maximise the window by clicking on ,
- Ensure the window is always on top (whilst working with other applications) by clicking on . (you can then remove this option by clicking on ).

-  Create a *note* on a contact: A new window appears and allows you to create a note on your contact (post-it).

Notes are recorded in the contact actions log and can be *visible* to every one (other users can only view the title of the note), *public* (the content will also be visible to everyone) or *private* (by default, you will be the only one to see the content). An example of a visible note is shown below.

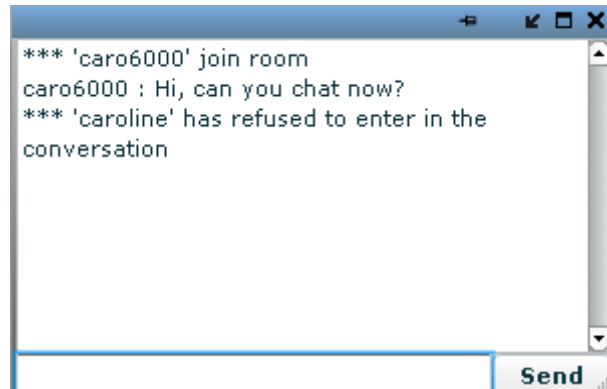




-  Chat with a colleague who has **TWS Caller**: A new window appears which allows you to chat with your contact once he approves the chat request.




If the contact refuses to chat, you will get the following message in your Text box:

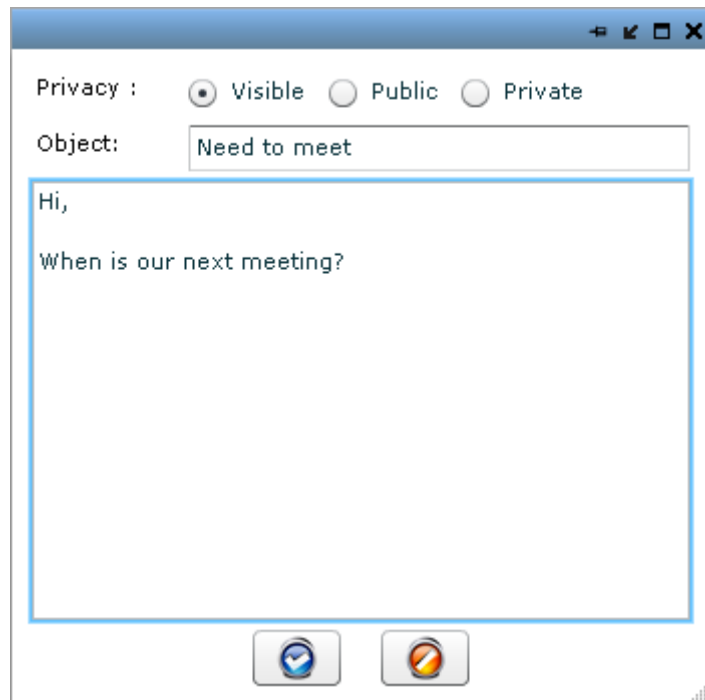
Note: this function differs from instant messaging as it cannot be used without authorization from the relevant contact.




-  Invite a contact to a video conference: This icon will be displayed. If the 2 users have the video conference application module (See VideoShare documentation).
-  Invite a contact to an audio conference: This icon will be displayed. If the 2 users have the audioshare application module (See AudioShare documentation).

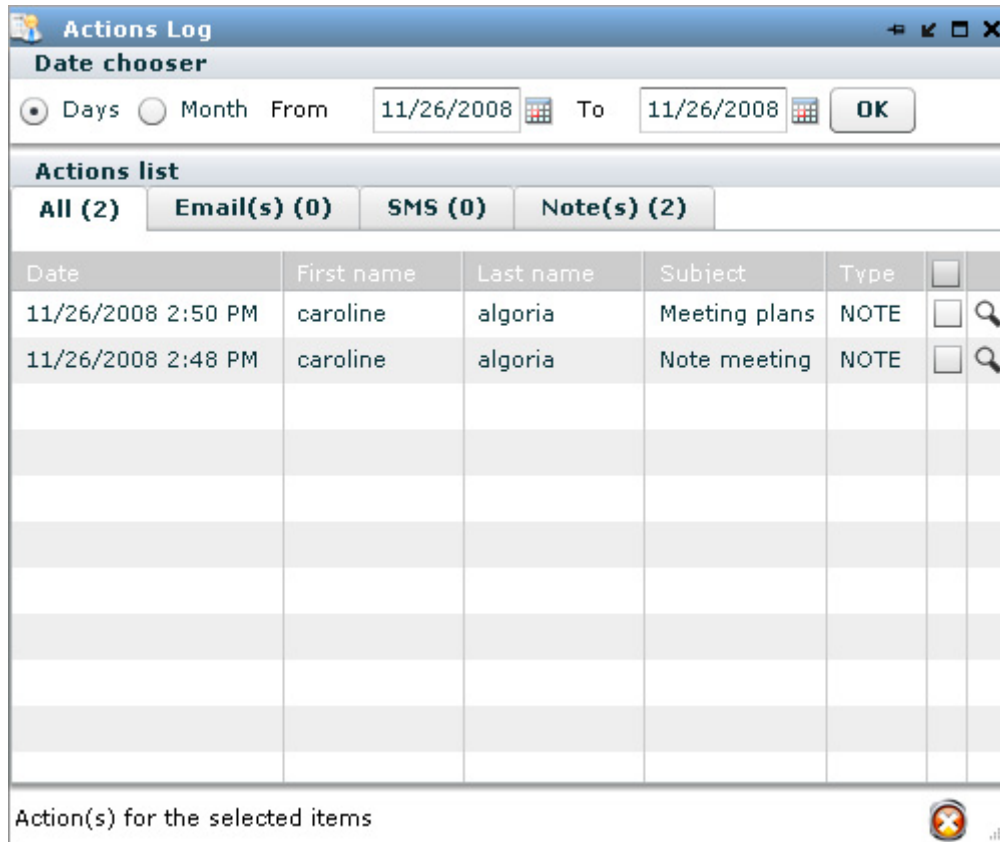
-  Send an SMS to a contact with a Mobile phone: A new window appears which allows you to send an SMS to your contact.

SMS are recorded in the contact actions log and can be made *visible* to every one (which allows other users to only view the subject of the SMS in the action log), *public* (the content will be visible as well to all users) or *private* (by default, you will be the only one to view the SMS in the actions log).



-  Display the list of actions made toward contacts through the actions log. The contact actions Log window opens and displays relevant actions with date, owner of the action, subject and type (Notes, mails or SMS).

Depending on their status (Visible, Public or Private), you will be able to see the headers, the detail or nothing. You will be able to filter the actions by type (Emails, SMS or Notes) and date. You can select and delete selected actions in the log.,



Actions Log

Date chooser





Days Month From 11/26/2008 To 11/26/2008 OK

Actions list


All (2) Email(s) (0) SMS (0) Note(s) (2)

Date	First name	Last name	Subject	Type		
11/26/2008 2:50 PM	caroline	algoria	Meeting plans	NOTE	<input type="checkbox"/>	
11/26/2008 2:48 PM	caroline	algoria	Note meeting	NOTE	<input type="checkbox"/>	

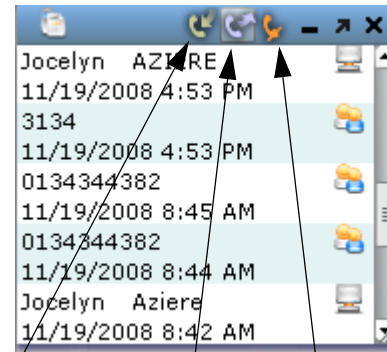
Action(s) for the selected items

-  Create a contact if the number is not recognized.
-  Edit the contact if it's a personal contact.
-  Delete the contact.
-  Copy the contact in order to use it in other applications (e.g. if you want to send it to someone through e-mail).

7. Call log

As stated in the name, the call log records all received, made and missed calls. You can display the call log window by clicking on the icon  in the application bar.

All calls are listed with the date, time, and the name of your contact if recognized. An icon represents the type of contact phone number. You can call back the contact by clicking on it. You can filter the window to see only incoming calls (by default), outbound calls, or missed calls.

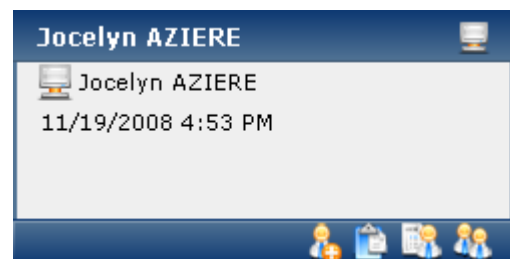


Outbound calls

Inbound Calls

Missed Calls

An Infocard is also opened by moving the mouse over the contact name to propose more actions (add a contact, add a note to the contact, view the action log or copy contact).



You can open the call log management window by clicking on , which allows you to:


- Sort your call log as desired (by first name, last name, number, company name, date),
- See the length of the calls,
- See the company of the contact when available,
- Delete an entry in the call log,
- Empty your call log,
- Click to call,
- Connect to other TWS users call logs.

Call Log					
Incoming calls	Outgoing calls	Missed calls			
Start	Duration	Company	First nam	Last nam	Phone num
11/26/2008 2:36 PM	00:00:00	Algoria	Jocelyn	Aziere	4531
11/26/2008 2:28 PM	00:00:00	Algoria	caro	p6000	6000
11/25/2008 9:49 AM	00:00:00	Algoria	caro	p6000	6000
11/25/2008 9:12 AM	00:00:07	Algoria	Jocelyn	Aziere	4531
11/25/2008 9:12 AM	00:00:05	Algoria	Jocelyn	Aziere	4531
11/25/2008 8:45 AM	00:00:00	Algoria	Jocelyn	Aziere	4531
11/24/2008 9:00 PM	00:00:00	Algoria	Jocelyn	Aziere	4531
11/24/2008 9:00 PM	00:00:16	Algoria	Jocelyn	Aziere	013434403
11/24/2008 9:00 PM	00:00:06				013434438
11/19/2008 4:53 PM	00:00:37	ALGORIA	Jocelyn	AZIERE	4031
11/19/2008 4:53 PM	00:00:00				3134
11/19/2008 8:45 AM	00:00:25				013434438
11/19/2008 8:44 AM	00:00:25				013434438
11/19/2008 8:42 AM	00:00:00	Algoria	Jocelyn	Aziere	4531
11/18/2008 11:10 PM	00:00:07				013434438
11/18/2008 11:09 PM	00:00:00	Algoria	Jocelyn	Aziere	4531
11/18/2008 10:59 PM	00:00:00	Algoria	Jocelyn	Aziere	4531
11/18/2008 10:43 PM	00:00:00	Algoria	Jocelyn	Aziere	4531

Empty the current call log (*) 

Note: you can also view the call log of other TWS users if you have the authorization set by your administrator.

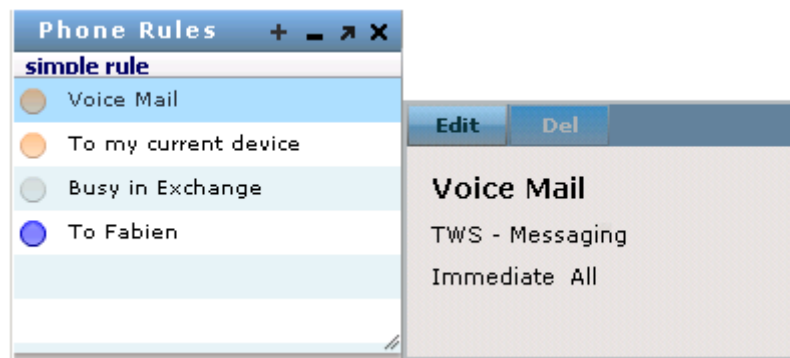
8. Managing Forwarding rules

You can display the Forwarding rules Window by clicking on the icon  in the application bar.

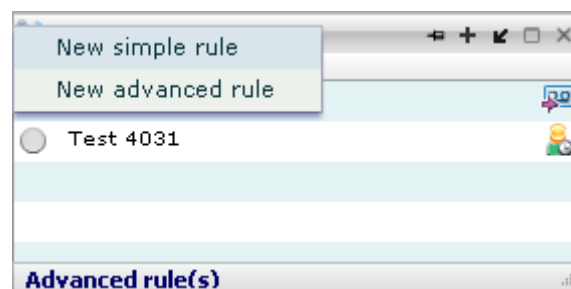
TWS Caller allows you to manage calls forwarding through one-click enabled forwarding rules, or based on presence status changes.

Note: by default, **TWS Caller** allows to manage simple rules described below - for informations about advanced forwarding rules, please refer to TWS Rules documentation.

TWS Caller forwarding rules interface clearly displays all created rules. An infocard also appears upon mouse over or when clicking on a rule to provide you with the relevant details.







To add a new rule, click on "+" in the upper right corner of the window, and select "New simple rule":



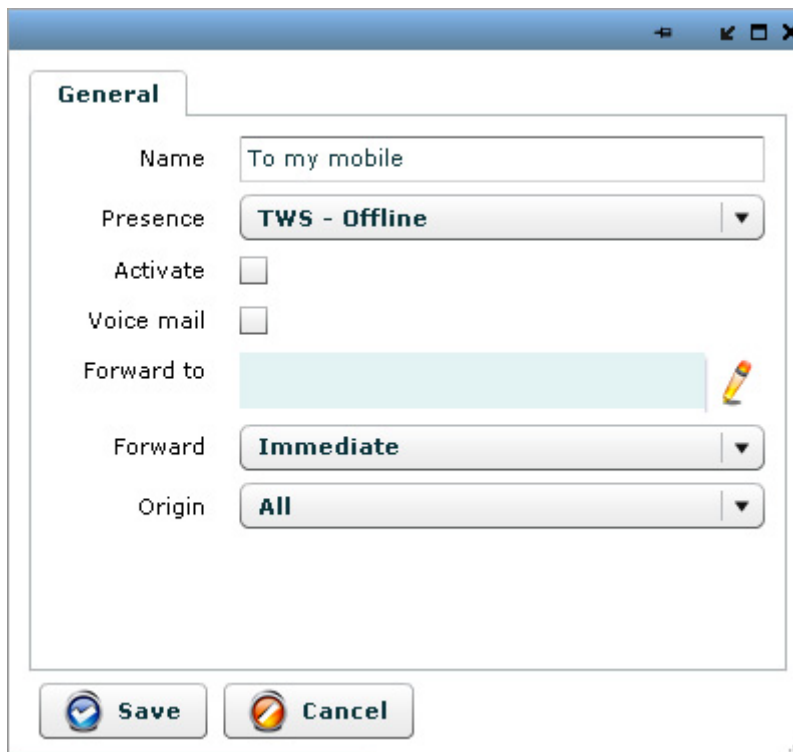
There are 2 types of rules: manual *rules* activated and disabled with one click by the user, and presence rules (also known as automatic rules, as activated automatically upon change of presence statuses).

There are also four rules' states:

- Active 
The programmed call forward within the rule is active and your calls are forwarded following the defined conditions.
Note: an active manual rule can be deactivated by clicking on the green bullet.
- non active 
They are known as « in service » and are activated either by the user (manual rule) or by presence status changes (automatic rule).
- Temporarily out of order 
They are automatic rules (only) temporarily out of order due to the activation of a higher priority rule (manual rule).
- Out of order 
They are automatic rules (only) fully out of order, and therefore cannot be activated. These rules can be in service only after editing and changing their status.

8.1.Simple rule activation

As shown in the screen below, a simple rule can be activated based on a presence status change (automatic rule) or not (manual rule).



General

Name: To my mobile

Presence: TWS - Offline

Activate: ☐

Voice mail: ☐

Forward to:

Forward: Immediate

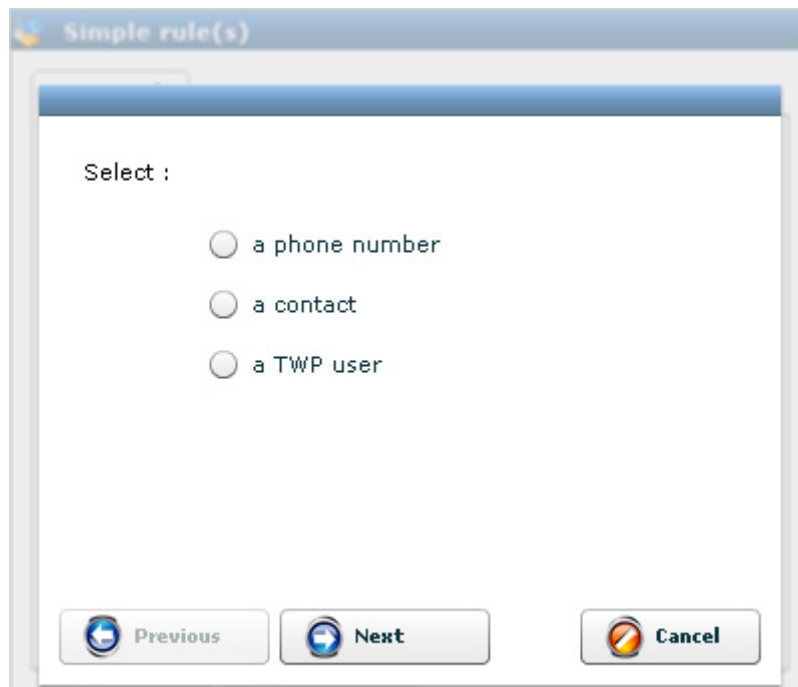
Origin: All

Save Cancel

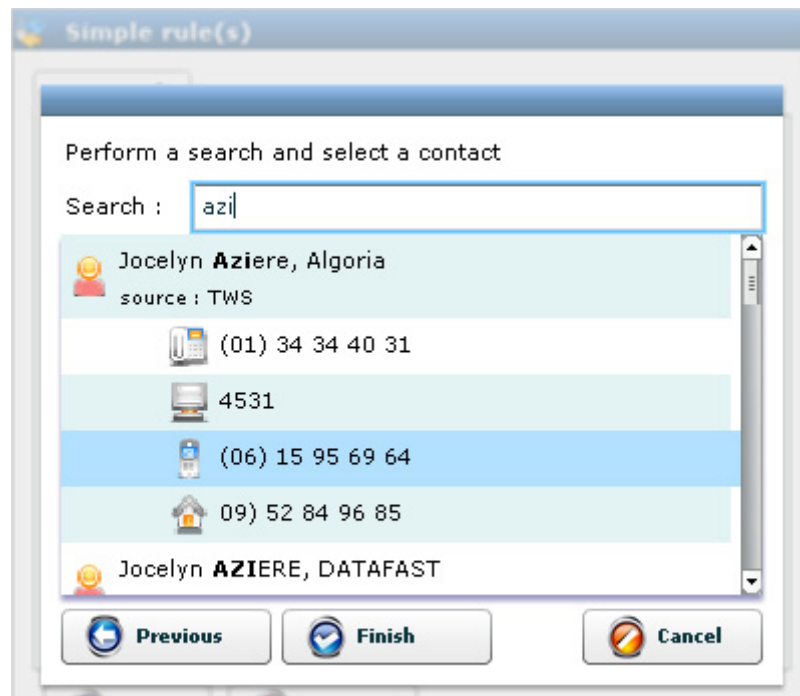
To create a simple rule, fill in the following information:

- Name of the forwarding rule,
- Activation or not upon presence status change: None, TWS presence status change to *Offline*, *Online*, *Busy*, *Not available/Absent*, *Messaging*, *My current device* - or upon specific calendar events in your e-Mail (*Lotus Notes* or *Ms Exchange*),
- Activation or not immediately after saving,
- Forward or not to voice mailbox (by clicking on «Voice mail») or to a defined number or a contact in TWS.

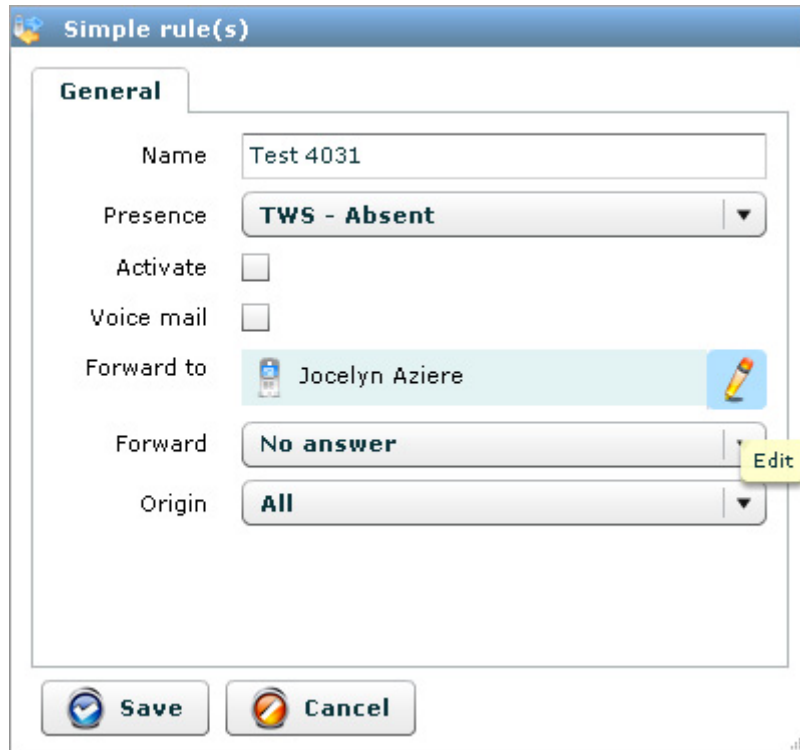
When you click on the «Edit» icon, you will see the screen below which allows you to select a phone number, contact or TWS user.



If you select a contact, the following window will allow you to search and select the relevant contact.



Once selected, click on «Finish».



You then need to complete:

- Forwarding condition type: *Immediate*, *Busy* or *no answer*,
- Filtering condition on the source of call: internal, external or all (On ASCOTEL IntelliGate, this option is not available).

And «Save».

8.2.Activation principles and priorities

To ease rule activation, there is a priority principle. The order of activation of different rules is described below (starting with the lowest priority):

- An Offline presence automatic rule: It is the lowest priority in order for other rules to activate a forwarding rule when **TWS Caller** is closed.
- A calendar presence automatic rule,
- A TWS presence automatic rule: As the presence is changed directly by the user, these rules have a higher priority than calendar presence rules,
- Manual activation rule: When only one manual rule is activated, all other rules with lower priority are temporarily moved to out of order state.


Other activation principles are described below:

- Only one rule in service by presence status.
- If a higher priority rule is activated (TWS presence - busy), the lower priority rule (Exchange presence - Busy) will only be activated once the first one is deactivated.
- Many manual rules can be activated together, but the first to be activated are disabled if they have the same forwarding type as the latest activated rules.
- A manual rule is automatically created if there is a rule created in the PABX platform which does not respect users' rules.

8.3.My current device

The notion of current device defined in the **TWS Caller** application allows you to call and receive calls from any device.

Simply create a presence status rule on *My current device* and fill in the forwarding conditions (See TWS presence Status section).



Simple rule(s)

General

Name: To my current device

Presence: TWS - My current device

Activate: ☒


Forward: Immediate

Origin: All

Save Cancel

8.4. Voice Mail rule

A forwarding rule called «Voice Mail» is automatically created the first time and activated every time you change your TWS presence status to «Messaging», thus transferring automatically all calls to your Voice Mail-box.




The screenshot shows a web-based configuration window titled "Simple rule(s)". It contains a "General" tab with the following settings:

- Name:** Voice Mail
- Presence:** TWS - Messaging (selected from a dropdown menu)
- Activate:** ☒
- Voice mail:** ☒
- Forward:** Immediate (selected from a dropdown menu)
- Origin:** All (selected from a dropdown menu)

At the bottom of the window are two buttons: "Save" (with a checkmark icon) and "Cancel" (with a red X icon).

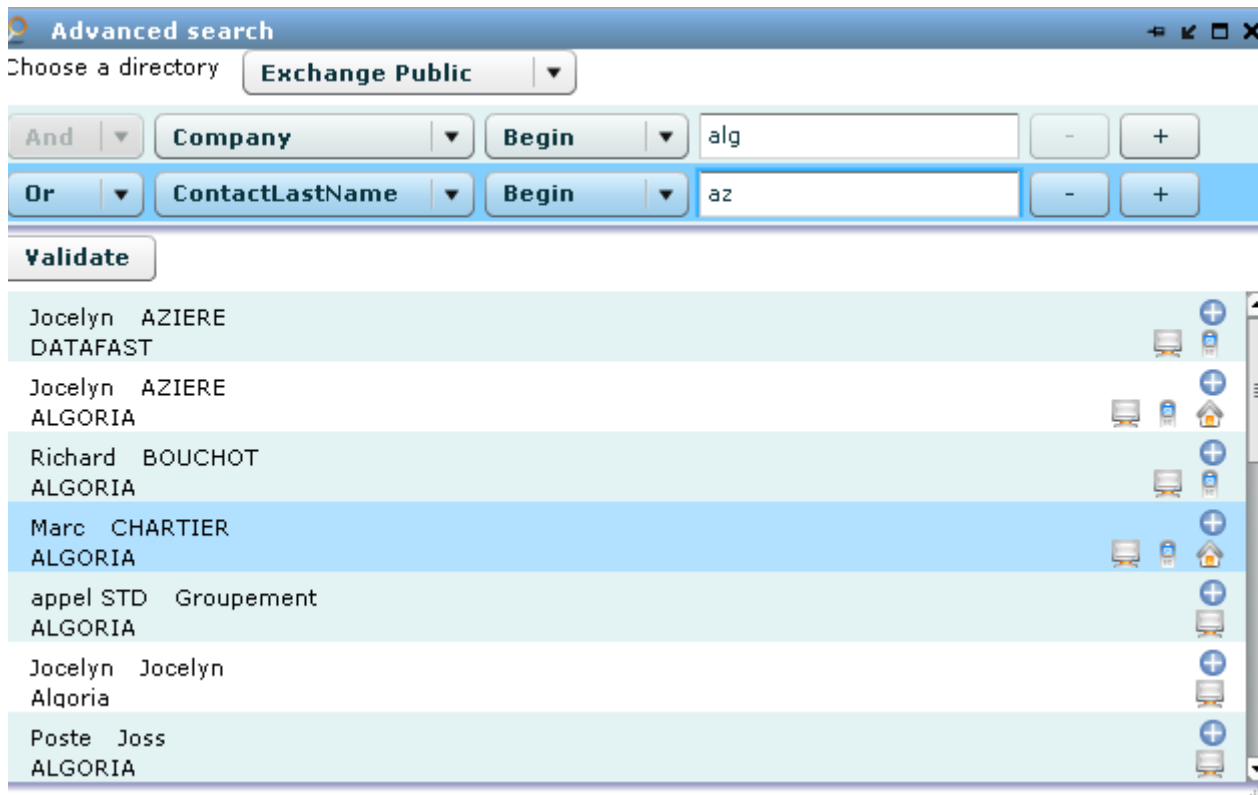
9. Advanced Search

You can display the Advanced Search window by clicking on the icon  in the application bar. You will then be able to set criteria for your search by selecting the directory in which you want to search, then the search field (Last name; First name, company, assistant phone, or Switchboard), and the condition (begin / contain / different / equal / finish, and text to search in the box). Click on «Validate» to launch the search.

Upon search:

- Contacts in the selected directory fulfilling set conditions will appear in the Advanced Search window. You can then click on the relevant phone icon to activate a call. A contact can have up to 5 different numbers represented by different icons described in the call management section above.
- if you get more than 30 results (parameter to be configured by your administrator), you will get the message «too Many results», you then need to search with more discriminatory criteria.

You can also add search criteria by clicking on + and using «and» or «or» to link the 2 conditions, as shown in the example below.



The screenshot shows the 'Advanced search' window. At the top, there's a dropdown for 'Choose a directory' set to 'Exchange Public'. Below this, there are two search criteria rows. The first row has 'And' as the operator, 'Company' as the field, 'Begin' as the condition, and 'alg' as the text. The second row has 'Or' as the operator, 'ContactLastName' as the field, 'Begin' as the condition, and 'az' as the text. A 'Validate' button is located below the criteria rows. The results section displays a list of contacts with their names and companies, and a phone icon for each. The contacts listed are: Jocelyn AZIERE DATAFAST, Jocelyn AZIERE ALGORIA, Richard BOUCHOT ALGORIA, Marc CHARTIER ALGORIA, appel STD Groupement ALGORIA, Jocelyn Jocelyn Algoria, and Poste Joss ALGORIA.

10. Preferences

You can display the Preferences Window by clicking on the icon  in the application bar.

You will then be able to select different options:

- display **TWS Caller** upon incoming calls (to be selected if you select «**TWS Caller** automatically hidden» as in the example below),
- display **TWS Caller** always on top of other windows,
- resize all other applications to allow **TWS Caller** sidebar to stay visible on the left side of your screen,
- change the forwarding rule to be applied when you set your TWS presence status to Messaging in order to activate the rule immediately upon inbound calls (by default) or only when the line is busy or in case of no answer,
- set to automatically move your TWS presence status to «Absent» after a certain time (in minutes) of computer inactivity,
- change your application language.



Note: When you decide to keep the **TWS Caller** sidebar hidden, the sidebar will also appear when you drag/drop a number (for speed dialling), or a string (for search), or when you move the mouse over the left side of your screen.